
From: Paul Barrett <[REDACTED]>
Sent: Tuesday, August 1, 2017 5:19 PM
To: Jeffrey Epstein
Cc: Richard Kahn
Subject: 2 things to do

Jeffrey

I think we see inflation tick higher in the coming two months after 4 low monthly prints. If that happens we probably see the 10yr move higher by 20-30bps and banks take another leg up.

Buy another \$2mm of XLF (Fins etf). We have \$1mm which is up ~3%.

MXN remains on my radar. If we get to 18.25 I would like to build a position in 5yr Mexican Govt bonds. They yield around 6%. So decent carry and a clear way to get long MXN.

Buy \$1mm if USDMXN gets to 18.2500.

Paul

Paul Barrett

[REDACTED]=?xml version=.0" encoding=TF-8"?> <!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">
<plist version=.0">
<dict>
 <key>conversation-id</key>
 <integer>36794</integer>
 <key>date-last-viewed</key>
 <integer>0</integer>
 <key>date-received</key>
 <integer>1501607959</integer>
 <key>flags</key>
 <integer>8590195717</integer>
 <key>gmail-label-ids</key>
 <array>
 <integer>6</integer>
 <integer>2</integer>
 </array>
 <key>remote-id</key>
 <string>735445</string>
</dict>
</plist>